CHILTON'S

AUTOMOTIVE INDUSTRIES

AUGUST 1990

GUIDE TO TRANSPLANT SUPPLIERS

THE PEOPLE — THE PRODUCT — THE PROCESS

COMPONENTS & SYSTEMS

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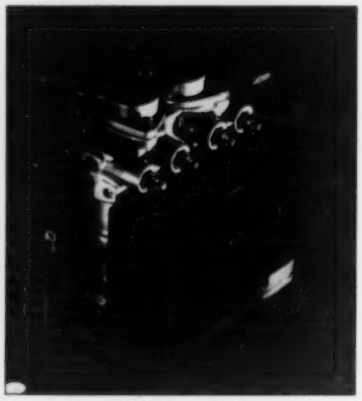

Once again we bring you the hotest components in the industry. More on page 34.

CHILTON'S AUTOMOTIVE INDUSTRIES

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Are Your Pensions Safe?

JOE CALLAHAN is editor-at-large of Automotive Industries magazine.

Forty percent of the nation's most underfunded pension plans are in the automotive industry.

The automotive industry is the biggest pension underfunding concern today for the Pension Benefit Guaranty Corp. (PBGC), the federal agency that insures the pensions of 40 million American workers covered by 103,000 defined pension plans. Those plans are largely based on income and time in service.

PBGC and the whole Bush Administration are nervous about the gigantic government-backed insurance program for fear it could become another S & L financial debacle. Chances of such a pension fund disaster appear to be quite slim, although a recession or even a Wall Street collapse could produce big problems.

Even though Chrysler Corp., General Motors and 18 suppliers have 20 of the nation's 50 most underfunded plans, it's also quite certain that the pensions of the employees of these companies are safe, as are the pensions of all employees insured by the PBGC.

While participation in the PBGC's insurance program is voluntary, this 16-year-old government agency has recently taken several steps to persuade its client companies to fully fund their pension plans as soon as possible.

Most prominent of these moves was the publication earlier this year of a list of the nation's 50 most underfunded pension plans.

This will now be done annually. Although underfunding a pension plan is neither a crime nor a signal of looming disaster, the Guaranty Corp. wants its clients to fund their pension coffers as well as possible, because it could incur huge future liabilities should any of these firms fail.

Currently the PBGC is paying the pensions of 109,000 US workers and expects to pay the pensions of 132,000 more as they reach retirement age. The agency claims it will "pretty well" cover every retiree's full pension up to a maximum of $2164 a month. Medical insurance and other fringe benefits are not covered.

The premium for this pension insurance is $16 per person per year, although it can climb to $50 per year, depending on how much the pension plan is underfunded.

James B. Lockhart, PBGC's executive director, emphasized recently that the firm's inclusion on the underfunded list is not an indication of a company's poor financial health or failure to satisfy the laws.

However, he added, "Workers are best assured of receiving their full pensions if employers fully fund their plans."

He also said that pension benefits are generally well protected by both the government insurance and the conservative investments which most companies have to increase their pension assets.

When a PBGC spokesperson was asked how well the pensions of today's employees are protected, she said, "They're very well protected in general. There is over $1 trillion in the pension funds today to cover some $800 billion in defined pension plan obligations."

While many automotive pension plans are underfunded, many other industries and companies often overfund their plans because of very successful investments or their desire to prepare for cyclical downturns or for tax advantages.

But for a variety of reasons, many automotive firms tend to underfund their plans. The 20 automotive companies listed below are underfunded a total of $8.3 billion, which is 59% of the $14 billion underfunding of the 50 most underfunded plans, and 27.6% of the total $30 billion that all PBGC-guaranteed pension plans are underfunded.

Chrysler Corp. alone has a pension fund deficit of $2.628 billion, which is 8.7% of the nation's $30 billion total pension underfunding.

A Chrysler spokesman said this was in line with Chrysler's "conservative" pension funding program which was announced two years ago to reduce its formerly greater pension fund indebtedness. This amounted to $3.05 billion in 1988.

Although these are substantial sums, Chrysler now has 62.4% of its pension program funded, which is a greater funding ratio than five other automotive pension funds. Sharon Steel has the most depleted pension fund with only 31.2% of its pension obligations covered.

General Motors was also listed because its pension fund had a shortfall of $1.9 billion last year. But this was only 9.9% below its fully funded level.

GM made no contributions last year to its major pension funds. Incidentally pensions of early retirees are treated the same as those of regular retirees.

At the end of 1989, Ford Motor Co.'s sala-

ried pension plan was overfunded by $3.028 billion, while its hourly plan was underfunded by $349 million, resulting in an overfunding of $2.679 billion.

Both hourly and salaried defined pension plans are insured by the PBGC, with the salaried plans generally being contributory in part.

Many companies have other non-defined pension plans for top executives and other individuals. These are based on other factors than years in service and income. AT

20 MOST UNDERFUNDED AUTOMOTIVE PENSION PLANS

(IN MILLIONS)

COMPANY	BENEFITS GUARANTEED	PLAN ASSETS	PERCENT FUNDED
Sharon Steel	$ 247	$ 77	31.2
LTV Corp.	381	138	36.1
Uniroyal-Goodrich	763	370	48.4
Eaton Corp.	120	68	56.5
Borg-Warner	181	107	59.0
Chrysler Corp.	6,987	4,358	62.4
Bethlehem Steel	4,192	2,812	67.1
Tenneco Inc.	296	200	67.6
Reynolds Aluminum	771	523	67.9
United Technologies	309	215	69.8
Dana Corp.	496	355	71.4
Rockwell Int.	621	446	71.8
Allegheny Ludlum	342	263	76.8
Navistar Int.	2,205	1,751	79.4
Armco Inc.	1,912	1,589	83.1
National Steel	896	753	84.0
Honewell Inc.	367	310	84.7
Goodrich	409	353	86.4
Goodyear	966	865	89.6
General Motors Corp.	19,388	17,478	90.1

TRANSPLANT SUPPLIER DIRECTORY

290 Japanese automotive suppliers are now in the US. Here's who they are, where they are, and what they do.

by JOSEPH M. CALLAHAN

In the past 24-26 months, 58 additional Japanese automotive supplier plants have been established in the US, bringing the total of these plants to 290. Some of the new plants represent new companies, while others are subsidiaries of existing companies.

None of the new plants were included in *Automotive Industries'* compilation of February, 1989, which listed 232 Japanese supplier plants doing business in the US. Most of the new plants have been established since 1988, although a number started up earlier.

The following list of new Japanese facilities in the US was compiled by ELM International of East Lansing, MI, a firm that specializes in tracking foreign suppliers of North American industries.

Last year's *AI* list of Japanese suppliers was supplied by the Japanese government to the US Department of Commerce. But the Japanese government no longer supplies such a list. Consequently, the Commerce Department, which is supposed to keep track of what's happening to the US auto supply industry, doesn't even know the extent to which the Japanese are moving into this country.

The Motor and Equipment Manufacturers Assn. (MEMA), a major auto supplier trade organization, also was unable to provide data on the transplant supplier invasion for the public. It was suggested that this information had commercial value.

While the phrase "Parent" in the following list normally would denote the owner of a plant, the term in most cases means "Brother," since the Japanese and their joint-venture partners generally are shy about revealing the real ownership.

A wide range of automotive parts and components are now being produced at these plants, only excluding bodies, engines and transmissions but including even keys. They will largely supply parts, many of whose elements are imported, to the Japanese vehicle transplants. But economic forces are causing the US vehicle makers to increasingly patronize these suppliers. AI

New Japanese Auto Supplier Plants In The US

PLANT	LOCATION	PARENT	PRODUCTS	EMPLOYEES	START
Ahresty Wilmington Corp.	Wilmington, OH 45177	Ahresty Wilmington Corp.	Aluminum castings	100	1988
Allied Ring Corp.	Manchester, MO 63011	Allied Ring Corp.	Steel piston rings	12	N/A
American MSC	Troy, MI 48083	American MSC	Precision compression rings	15	1987
Asahi Motor Wheel Corp.	Somerset, KY 42501	Asahi Motor Wheel Corp.	Aluminum wheels	300	1988
Automotive Electronic Control Systems	Anderson, SC 29622	Automotive Electronic Control Systems	Electronic controls	N/A	1988
CEI Company	Springfield, TN 37173	CEI Company	Motor actuators	90	1989
Clevite-Bridgestone	Angola, IN 46703	Clevite-Bridgestone	Rubber parts	180	N/A
CME Corp.	Mt. Pleasant, MI 48858	CME Corp.	DC Motors for wipers, windows	165	1987
D and A Technology	Mt. Pleasant, MI 48474	D and A Technology	Encapsulation of glass	N/A	1989

PLANT	LOCATION	PARENT	PRODUCTS	EMPLOYEES	START
Dexter Fastener Technologies	East Dexter, MI 48130	Dexter Fastener Technologies	Auto fasteners	N/A	1989
Diamet Corp.	Columbus, IN 47202	Diamet Corp.	Engine, transmission parts	85	1988
Elsa Corp.	Elwood, IN 46036	Elsa Corp.	Exhaust systems, fuel tanks	11	1987
Enpak Inc.	Memphis, TN 38114	Enpak Inc.	Auto batteries	175	1988
Freudenberg-NOK Partnership	LaGrange, GA 30240	Freudenberg-NOK Partnership	Various oil seals	833	1989
Goetze Corp. of America	Manitowoc, WI 54221	Goetze Corp. of America	Piston rings	284	N/A
Goetze Corp. of America	Schofield, WI 54476	Goetze Corp. of America	Valve inserts, piston rings	250	N/A
Goetze Gasket Co.	LaGrange, GA 30240	Goetze Corp. of America	Gaskets, spacers, rings	160	N/A
Green Tokai Co.	Brookville, OH 45308	Green Tokai Co.	Door, window seals	160	1987
Greenville Technology, Inc.	Greenville, OH 45331	Greenville Technology, Inc.	Trim, wheel covers, other parts	232	1987
H.A. Parts of Indiana	Greencastle, IN 46135	Happico Inc.	Wheel covers, trim	150	1988
Harada Industries of America	Gardena, CA 90248	Harada Industries of America	Radio antennas	120	1977
Hi-Lex Controls	Litchfield, MI 49252	Hi-Lex Corp.	Window regulators	125	1975
Hitachi Cable Indiana	Albany, IN 47150	Hitachi Cable Indiana	Various hose assemblies	20	1987
Hoover-Ikeda	Murfreesboro, TN 37130	Hoover-Ikeda	Trim, headliners	13	1987
Ichikoh Mfg. Inc.	Shelbyville, KY 40065	Ichikoh Mfg. Inc.	Auto mirrors	180	1987
Il Stanley Co.	Battle Creek, MI 49015	Il Stanley Co.	Lights, modular components	370	1987
Indiana Precision Technology, Inc.	Greenfield, IN 46140	Indiana Precision Technology, Inc.	Fuel injectors	200	1988
Intat Precision	Rushville, IN 46173	Intat Precision	Engine, differential parts	20	1988
ITW-Nifco, Inc.	Hilliard, OH	ITW-Nifco, Inc.	Plastic fasteners, other parts	59	1987
Kamco Industries	West Unity, OH 43570	Kamco Industries	Small plastic parts	40	1987
Koyo Corp.	Battle Creek, MI 49015	Koyo Corp.	Air conditioner tubing	42	N/A
Lucas Sumitomo Brakes, Inc.	Lebanon, OH 45036	Lucas Sumitomo Brakes, Inc.	Front brake calipers	90	1988
M-Tek Inc.	Manchester, TN 37355	M-Tek Inc.	Soft door trim	100	1987
MCC Panasonic	Peachtree, GA 30269	MCC Panasonic	Radio components	680	1987

Continued on p. 62

TRANSPLANT SUPPLIER DIRECTORY

PLANT	LOCATION	PARENT	PRODUCTS	EMPLOYEES	START
MG International	Powder Springs, GA 30338	MG International	Wire harnesses	36	1987
Michigan Automotive Compressor, Inc.	Parma, MI 49269	Michigan Automotive Compressor, Inc.	Air conditioner, clutch parts	250	1989
Murata Erie North America	State College, PA 16801	Murata Erie North America	Ceramic resonators, filters	750	1981
Nachi Precision Industries, Inc.	Greenwood, TN 46143	Nachi Technology Industries, Inc.	Ball bearings, gear cutters	N/A	N/A
Nachi Technology	Greenwood, TN 46143	Nachi Technology	Ball bearings	N/A	N/A
Nakanishi Mfg.	Wintersville, GA 30683	Nakanishi Metal Works Co.	Bearing retainers	80	1988
Nakatan Horizon Industries, Inc.	New Boston, MI 48916	Nakatan Horizon Industries, Inc.	Transmission, clutch components	7	1988
New Mather Metals	Toledo, OH 43612	New Mather Metals	Suspension, clutch components	117	1987
Newman Technology	Mansfield, OH 44902	Newman Technology	Exhaust, window, molding parts	355	1987
Nippondenso Tennessee, Inc.	Marysville, TN 37602	Nippondenso Tennessee, Inc.	Instrument cluters	120	1988
Ohio Star Forge	Warren, OH 44483	Ohio Star Forge	Forged bearings	12	1988
Ortech	Kirksville, MO 63501	Ortech	Door locks, handles, keys	11	1987
PK U.S.A.	Shelbyville, IN 46178	PK U.S.A.	Parts for suspensions, trim, chassis	150	1988
Purodenso Co.	Jackson, TN 38302	Purodenso Co.	Filters, filter housings, elements	15	1990
Quality Spring/ Togo Inc.	Coldwater, MI 49036	Quality Spring/ Togo Inc.	Various springs	150	1987
Setex Inc.	St. Marys, OH 45885	Setex Inc.	Car seats	130	1988
Shiroki-Wickes	Smithville, TN 37166	Shiroki-Wickes	Electro-mechanical assemblies	120	1988
Sparta Foundry	Sparta, MI 49345	Goetze Corp. of America	Piston rings, valve guides, pulleys	300	N/A
T.S. Trim Industries	Athens, OH 45701	T.S. Trim Industries	Interior fabric panels	286	1987
Takata-Fisher Corp.	Pigua, OH 45356	Takata-Fisher Corp.	Seat belts	110	1984
Trim Masters	Harrodsburg, KY 40330	Trim Masters	Seat covers, door trim	420	1987
Vuteq Corp.	Bloomington, IL 61761	Vuteq Corp.	Auto windows	10	1987
Yotec, Inc.	Springfield, OH 45503	Yotec, Inc.	Steering parts, water pumps	65	1988
Zua Autoparts	Oakwood, GA 30566	Zua Autoparts	Power steering pumps	20	1989

AUTOMAKER QUARTERLY REPORT

by DR. THOMAS O'GRADY

The downturn in automotive sales continued through the second quarter of 1990, with total volume coming in at more than 8% below 1989 levels. Cutbacks in both car and light truck production also continued throughout the quarter, although the reductions were not nearly as severe as in the first three months of the year. Recent third and fourth quarter production schedules still appear too optimistic, and we expect US automakers to trim additional output from their planned levels.

Midsummer price increases from the domestics, combined with high expected price hikes across the board for the 1991 model year, dim the outlook for a sales rebound in the second half of the year.

During the first quarter of this year, GM appeared to be off to a very good start in its efforts to reverse its downward slide in market share. However, by the end of the second quarter, GM's leading margin narrowed considerably. As expected, Ford lost about one and one-half of a percentage point in market share during the quarter. Chrysler's share of the car market slipped from 10.7% in 1989 to 8.9% in 1990, allowing Honda to surpass it in number of passenger cars sold.

Chrysler's share slipped from 10.7% in 1989 to 8.9% in 1990, allowing Honda to surpass in number of passenger cars sold.

Once again, Honda's Accord topped the best seller list for the quarter, but this time its sales lead over the Ford Taurus and the Chevrolet Corsica/Beretta widened to more than 26,000 units. The Honda Civic also moved up the list to the number four slot, joining two Toyota models (the Camry and Corolla) already in the top ten. However, this is not to say that importers are weathering the industry downturn any better than the domestics. A few foreign automakers – including Honda, Toyota, Mercedes-Benz and Volkswagen/Audi – did increase their respective sales this year, but most of the importers are still struggling not to lose volume. One notable exception is Mitsubishi, which is in the midst of an aggressive expansion in the US and reported a 69.4% rise in its second quarter car sales. AI

Dr. Thomas O'Grady is president and chief analyst of Integrated Automotive Resources in Wayne, PA, and publisher of Fast Track News.

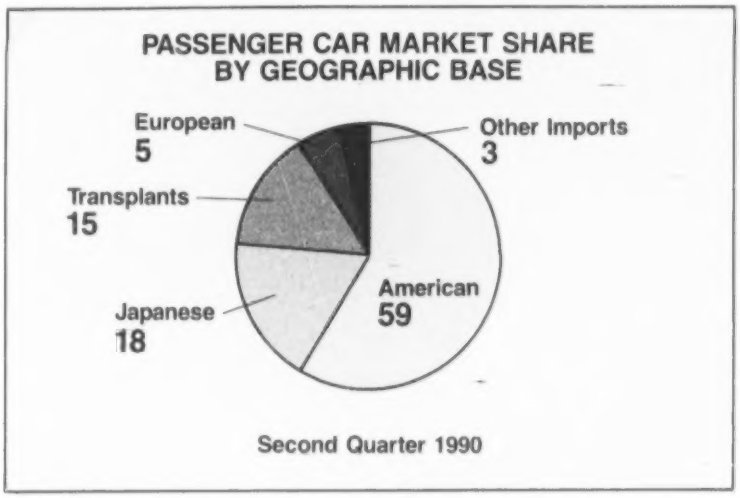
WHAT'S HOT!
Domestic Auto Sales
2nd Quarter 1990

Carline	'90	'89	% Change
Accord*	108,973	94,127	15.77%
Taurus	82,635	102,165	-19.12%
Corsica/ Beretta	82,229	112,461	-26.88%
Civic/ CRX*	81,012	68,019	19.10%
Escort	75,502	86,464	-12.68%
Cavalier	74,223	81,794	-9.26%
Camry*	71,489	75,622	-5.47%
Grand Am	68,067	56,404	20.68%
Lumina**	62,790	22,149	183.49%
Corolla*	59,555	50,120	18.82%

* – Includes imports
** – Lumina replaced the Chevrolet Celebrity, which sold 55,192 units in the second quarter of 1989

US Passenger Car Market Shares
2nd Quarter, 1990

Manufacturer	'90 Sales	% Total	'89 Sales	% Total	% Change
General Motors	925,497	36.58%	1,006,923	36.55%	-8.09%
Ford	519,009	20.52%	611,724	22.20%	-15.16%
Honda/Acura	243,922	9.04%	216,472	7.86%	12.68%
Chrysler	224,251	8.86%	294,770	10.70%	-23.92%
Toyota/Lexus	202,095	7.99%	176,509	6.41%	14.50%
Nissan/Infiniti	115,232	4.55%	135,865	4.93%	-15.19%
Mazda	58,049	2.29%	58,986	2.14%	-1.59%
Mitsubishi	46,395	1.83%	27,383	0.99%	69.43%
VW/Audi	45,440	1.80%	45,326	1.65%	0.25%
Hyundai	35,462	1.40%	48,599	1.76%	-27.03%
TOTAL CARS	2,529,891	100%	2,755,221	100%	-8.18%



Passenger Car Market Share By Geographic Base

First Quarter 1990

Manufacturers	Total Sales	Total Market Share
American	1,487,546	58.80%
Japanese	464,231	18.35%
European	123,612	4.89%
Transplants	384,991	15.22%
Other Imports	69,511	2.75%
Total	2,529,891	100.00%

2ND QUARTER 1990 DOMESTIC LIGHT TRUCK PRODUCTION*

COMPANY	FULL-SIZE TRUCKS	COMPACT TRUCKS	FULL-SIZE VANS	COMPACT VANS	FULL-SIZE SPORTS UTILITY	COMPACT SPORTS UTILITY	TOTAL 1Q '90	TOTAL 1Q '89
FORD	170,141	78,347	58,879	62,028	14,647	66,853	450,095	468,750
CHEVROLET	128,422	55,948	39,321	62,030	31,817	49,058	366,596	372,297
GMC	53,008	13,541	14,492	14,634	17,631	11,066	124,372	119,991
CHRYSLER/ DODGE	30,604	20,328	26,968	133,963	---	---	211,863	216,935
JEEP	---	2,240	---	---	2,470	66,064	70,774	100,433
NISSAN	---	40,282	---	---	---	---	40,282	30,265
OLDS	---	---	---	11,450	---	---	11,450	---
PONTIAC	---	---	---	13,465	---	---	13,465	---
ISUZU	---	4,512	---	---	---	826	5,338	---

Includes Suburban and P-model *Built in the US and Canada

Boomermobiles

RAY WINDECKER's 45 years in the industry culminated at Ford, where he was research and analysis manager, public affairs. He now runs American Autodatum, an 'automotive numbers and words' company.

The children of 'boomers' bought five times as many Ford Escorts as they did Honda Civics.

Baby boomers, that sometimes mythical, sometimes real, high buying-power group of American consumers aged 26 to 44, buy a great number of cars. In 1989, they purchased 4.34 million new cars for a 44% share of the new-car market.

'Boomers' are people born between 1946 and 1964, children of the post-World War II economic and baby booms. They're not to be confused with yuppies, though. Yuppies conform to a set of physical and mental images generally outlined by the words "I want," while boomers are all people included in that particular age group.

Boomers are everywhere. There are more than 75 million of them and they're courted by all marketers, including those at the auto companies. And why not? Boomers, through sheer numbers, command marketing attention and clout.

In 1975, when many boomers were still too young to drive and their upper age limit was 29 years, the age group as a whole bought 31% of all new cars. By 1980, they held 40% of the new-car market. In 1985, when the boomers' age bulge ranged from 21 to 39 years, they were all of buying age and had reached what is assumed to be the peak of their purchase rate at 45% of all new cars.

In 1989, with the boomer age range then from 25 to 43, their share of new-car purchases was 44%. This is no different statistically than from 1985, indicating the boomers purchasing power peaked in the mid-'80s. That is as it should be, as boomers are a new aging group with no new first-time buyers moving into the market.

Boomers inhabit all of the many levels of social and economic strata. Although they contain a small minority of high-income yuppies, there are a great many more in the moderate income group. Most are average people that react to the market as do other age groups.

One notable trend is that boomers, as they age, buy larger and or more expensive cars. The logic is impeccable – on average, age equates to increased job experience, and therefore more income. Thus, this means both more money to spend with often larger family groups.

A quick look at the segment movement over the past five years shows that boomers bought 59% of the small subcompact cars sold in 1984 but by 1989, that rate had dropped to 52%. Conversely, the boomers bought 26% of the luxury cars delivered in 1984 and 31% in 1989. Obviously, there was more money available to the aging boomers and more offspring requiring transportation.

The shift in boomer buying patterns were almost, but not quite, a direct movement towards the larger or more expensive cars. The exception was the large-car segment dominated by the likes of the Chevrolet Caprice and Ford Crown Victoria where the buying rate was steady, as was the styling of the cars. It will be interesting to see if the new, high-styled Caprice and the upcoming Crown Victoria will attract boomer buyers.

Boomers will continue as an important part of the automotive market. In the year 2000, they will be of prime buying age, ranging from 36 years to 54. Even 20 years from now, in 2010, the oldest boomers will be 64 – the youngest 46 – and they should then still make up more than 35% of all new car buyers.

Following national trends, the boomers in 1989 bought Honda Accords and Ford Taurus models. Boomers do present a challenge to the domestic carmakers. To win a larger share of the boomer market, the domestics must convince many of the boomers – raised in an anti-establishment time – that the establishment has changed.

However, note that the boomers' children, now ranging in age up to 24 years and attracted by the lower price and acceptable quality of today's domestic cars, bought five times as many Ford Escorts as they did Honda Civics. It will be interesting to watch this post-boomer group as they mature. AI

Boomer Buys

Category	Percent bought 1984	1989
Subcompact	59%	52%
Small Sporty	71%	66%
Compact	48%	49%
Midsize	31%	34%
Mid Specialty	44%	48%
Large	16%	16%
Luxury	26%	31%